



Uniting Business for Good

Florida's Changing Economic, Demographic & Political Landscape and Why Business Matters

A man in a suit, Mark Wilson, is speaking at a podium. Behind him is a large screen displaying a presentation titled "THE FLORIDA CHAMBER OF COMMERCE". The screen shows various economic statistics for the State of Florida, including unemployment rates, GDP, and population. The Florida state flag is visible to the left of the speaker.

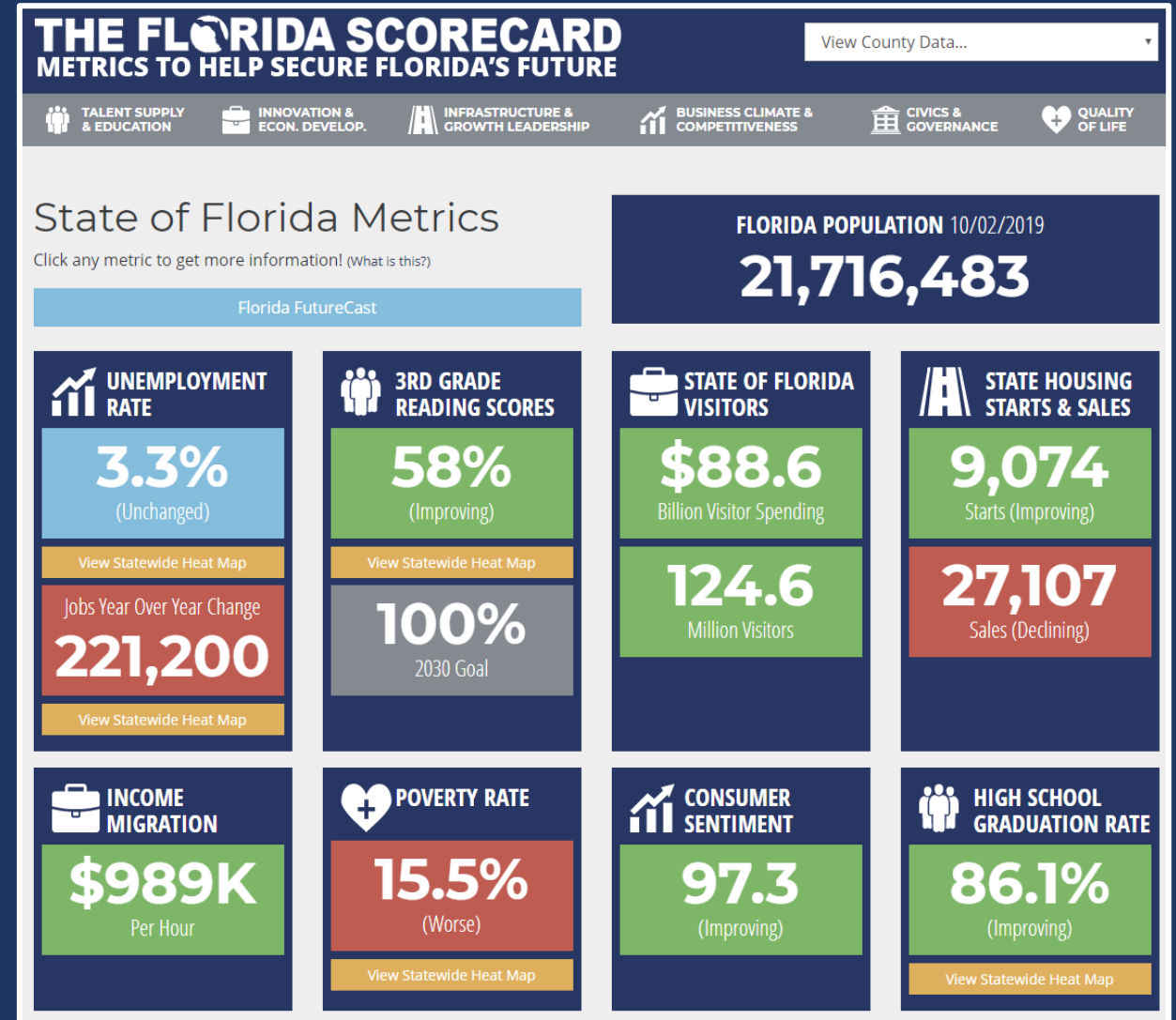
“Florida is changing. Our ECONOMICS, our demographics and our politics are all changing and these changes are both opportunities and challenges.” – Mark Wilson

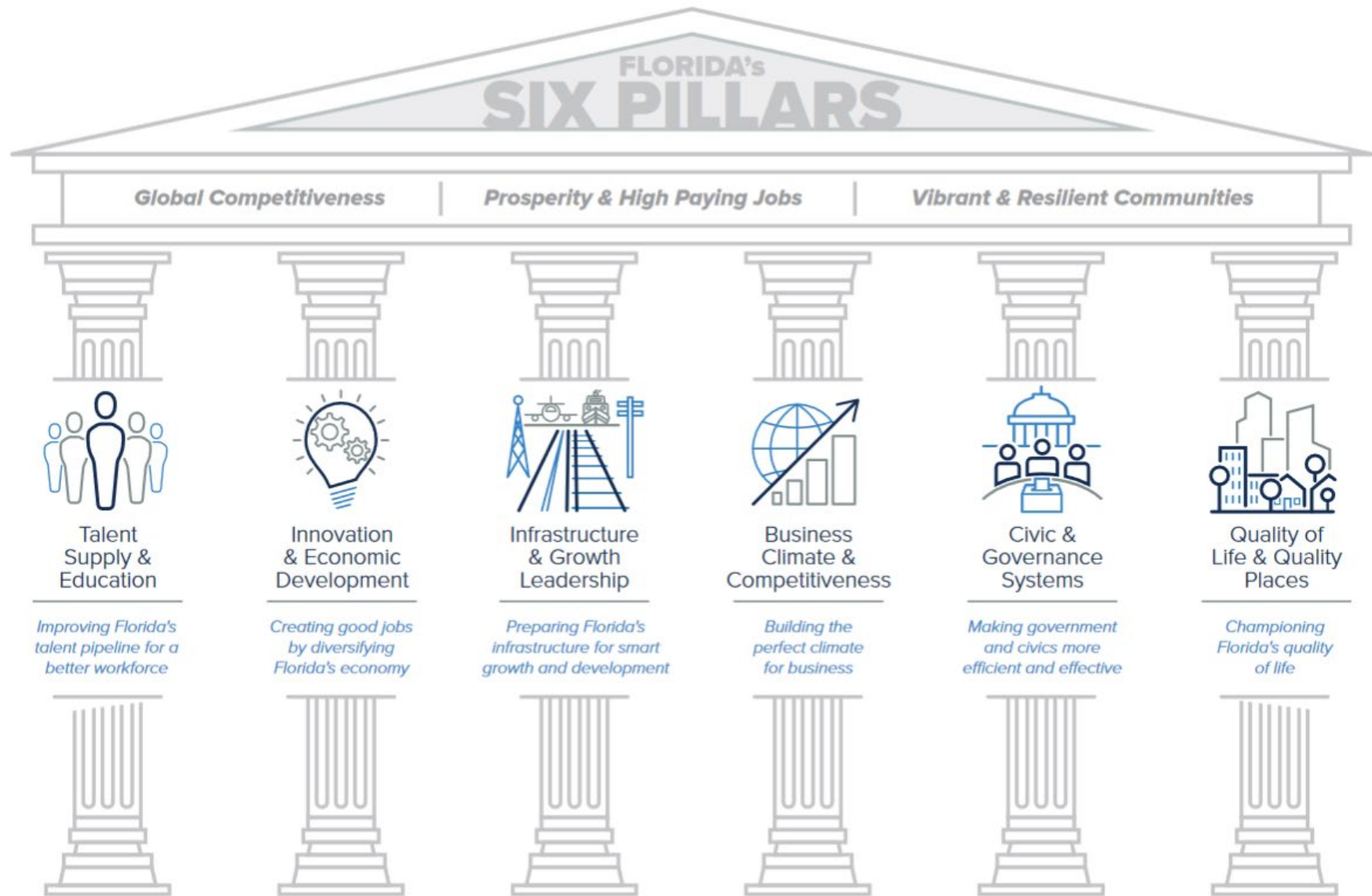
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Florida At A Glance

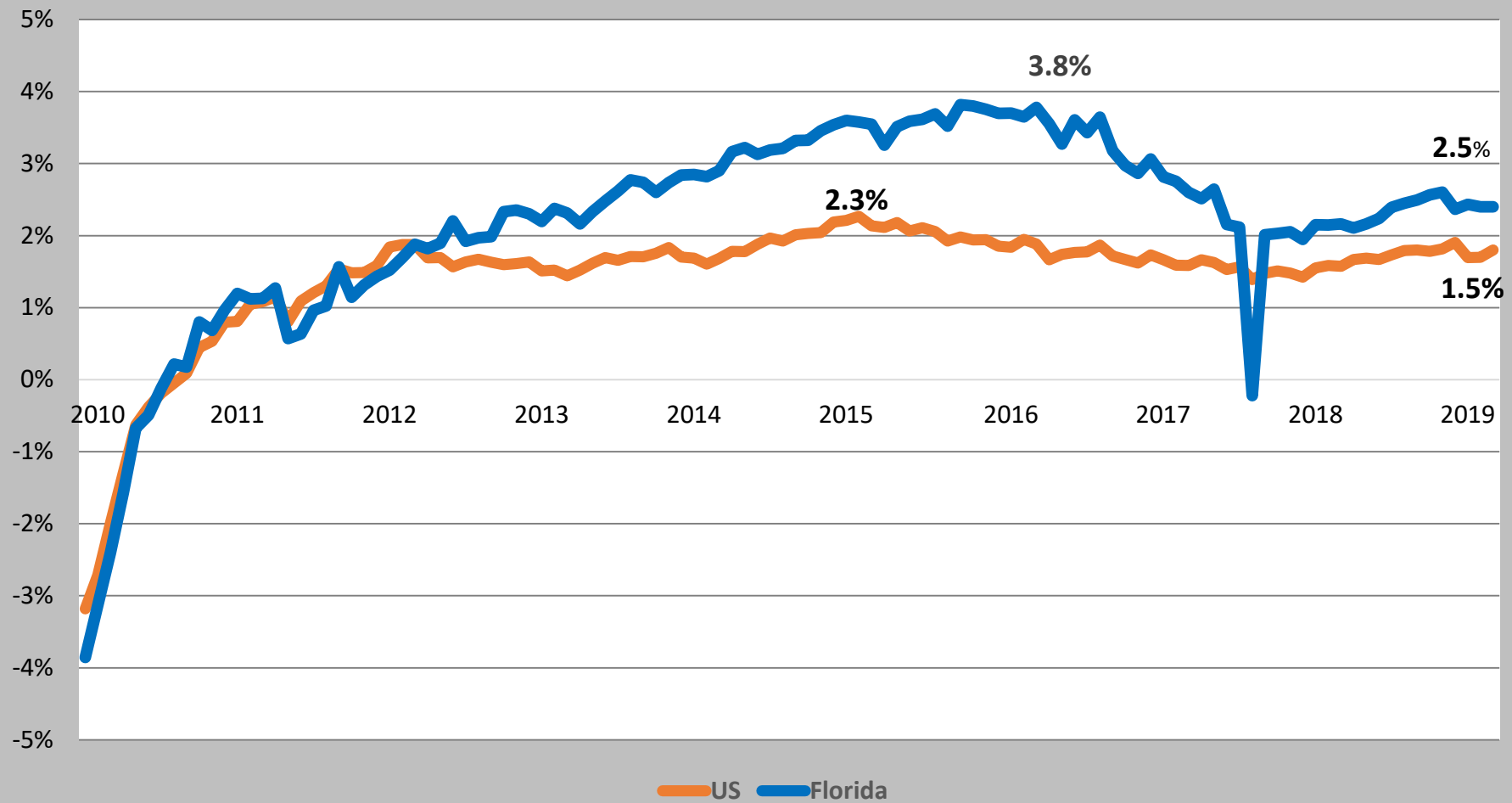
- Florida's Economy \$1 Trillion GDP (17th)
- 21.7 Million Residents
 - 3rd / 26M By 2030 / More Than 900/Day
- 124.6 Million Visitors In 2018 (+50M by 2030)
- Florida Creates 1 In 13 New U.S. Jobs
- **FL's Talent Gap:** 285,500 Jobs Looking for People/342,000 People Looking for Jobs.

www.TheFloridaScorecard.org





Job Growth Rates - Florida versus U.S.

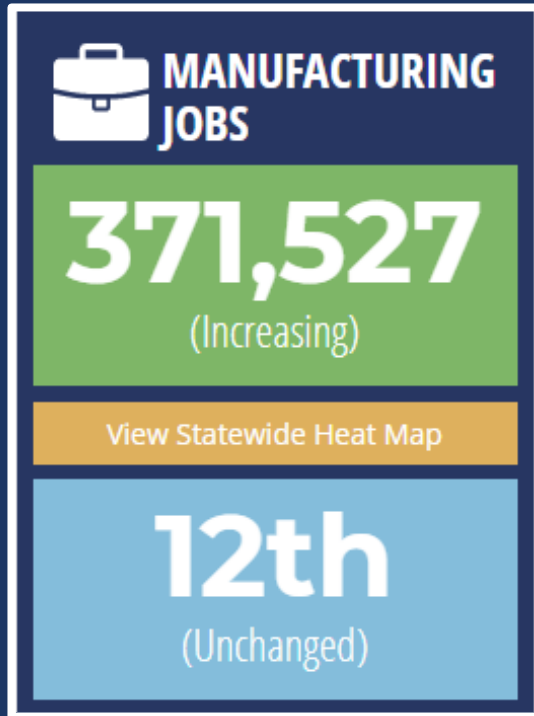


Job Creation by Industry

Industry	Jobs – August 2018 thru August 2019	Percent Growth
Education & Health Services	62,800	4.8%
Professional & Business Services	46,800	3.4%
Leisure & Hospitality	23,500	1.9%
Trade, Transportation & Utilities	21,900	1.2%
Construction	20,900	3.8%
Financial Activities	18,700	3.2%
Manufacturing	11,100	3.0%

Manufacturing in Florida

Manufacturing: Florida 3.7x U.S. Rate



Top 5
2030 Goal



Improving Florida's Manufacturing Climate

The Florida Chamber has...

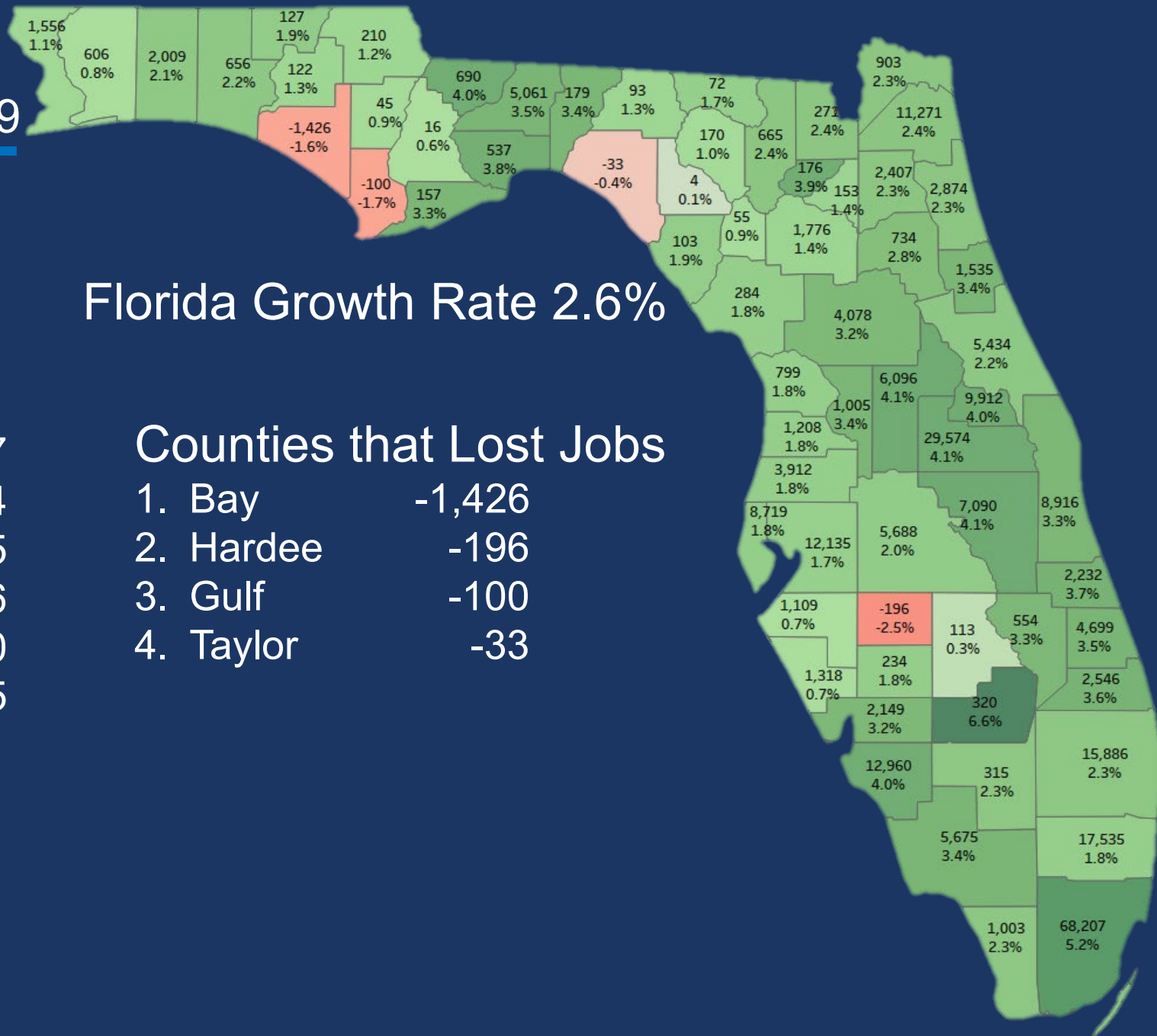
Led the effort to support legal reform and bringing Florida out of the bottom 5 legal climates in the country.

Led the effort to cut the business rent tax.

Led effort for the Research and Development tax credit.

Led the effort for permanently exempting equipment and machinery from sales tax.

Job Creation August 2018 – August 2019



U.S. Growth Rate 1.4%

Florida Growth Rate 2.6%

Top Counties for Jobs

1. Miami-Dade	68,207
2. Orange	29,574
3. Broward	17,535
4. Palm Beach	15,886
5. Lee	12,960
6. Hillsborough	12,135
7. Duval	11,271
8. Seminole	9,912
9. Brevard	8,916
10. Pinellas	8,719

Counties that Lost Jobs

1. Bay	-1,426
2. Hardee	-196
3. Gulf	-100
4. Taylor	-33

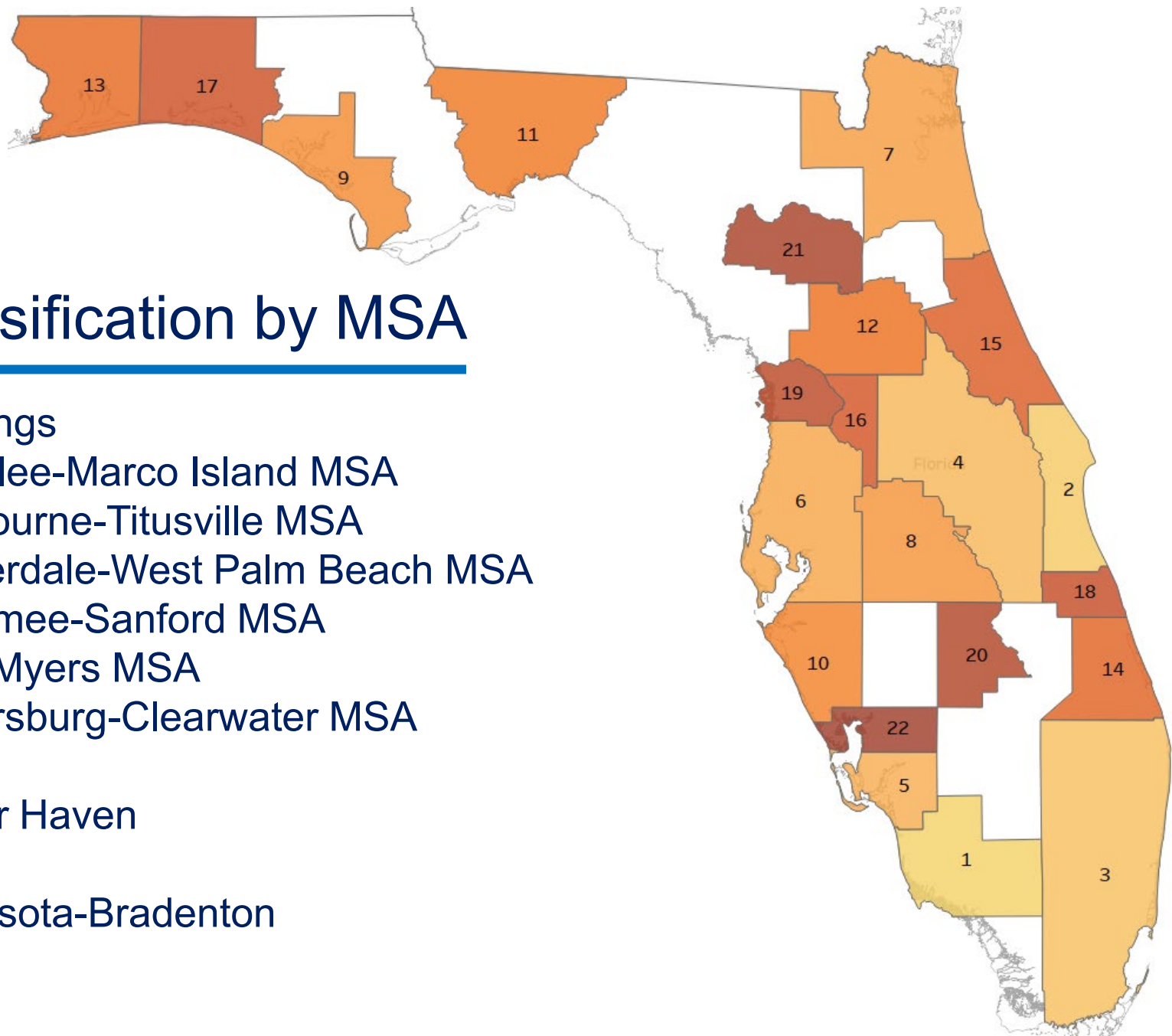
Florida's Economic Diversification Strategy is Working

Florida in 2017



Florida now





Industry Diversification by MSA

Diversification Rankings

- #1 Naples-Immokalee-Marco Island MSA
- #2 Palm Bay-Melbourne-Titusville MSA
- #3 Miami-Ft. Lauderdale-West Palm Beach MSA
- #4 Orlando-Kissimmee-Sanford MSA
- #5 Cape Coral-Ft. Myers MSA
- #6 Tampa-St. Petersburg-Clearwater MSA
- #7 Jacksonville
- #8 Lakeland-Winter Haven
- #9 Panama City
- #10 North Port-Sarasota-Bradenton

Fixing Florida's Broken Legal Climate



Florida ranked **46th** out of all
50 U.S. states
(bottom 5 ranking)

Florida families pay **\$4,442**
every year in a lawsuit tax



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Florida's Next 4.5 Million People

Top 10 Growth in People

1. Miami-Dade	639,060
2. Orange	451,990
3. Hillsborough	412,926
4. Broward	329,843
5. Palm Beach	279,976
6. Duval	225,250
7. Lee	212,763
8. Osceola	178,394
9. Polk	171,439
10. Pasco	129,769

Top 10 Growth in Percent

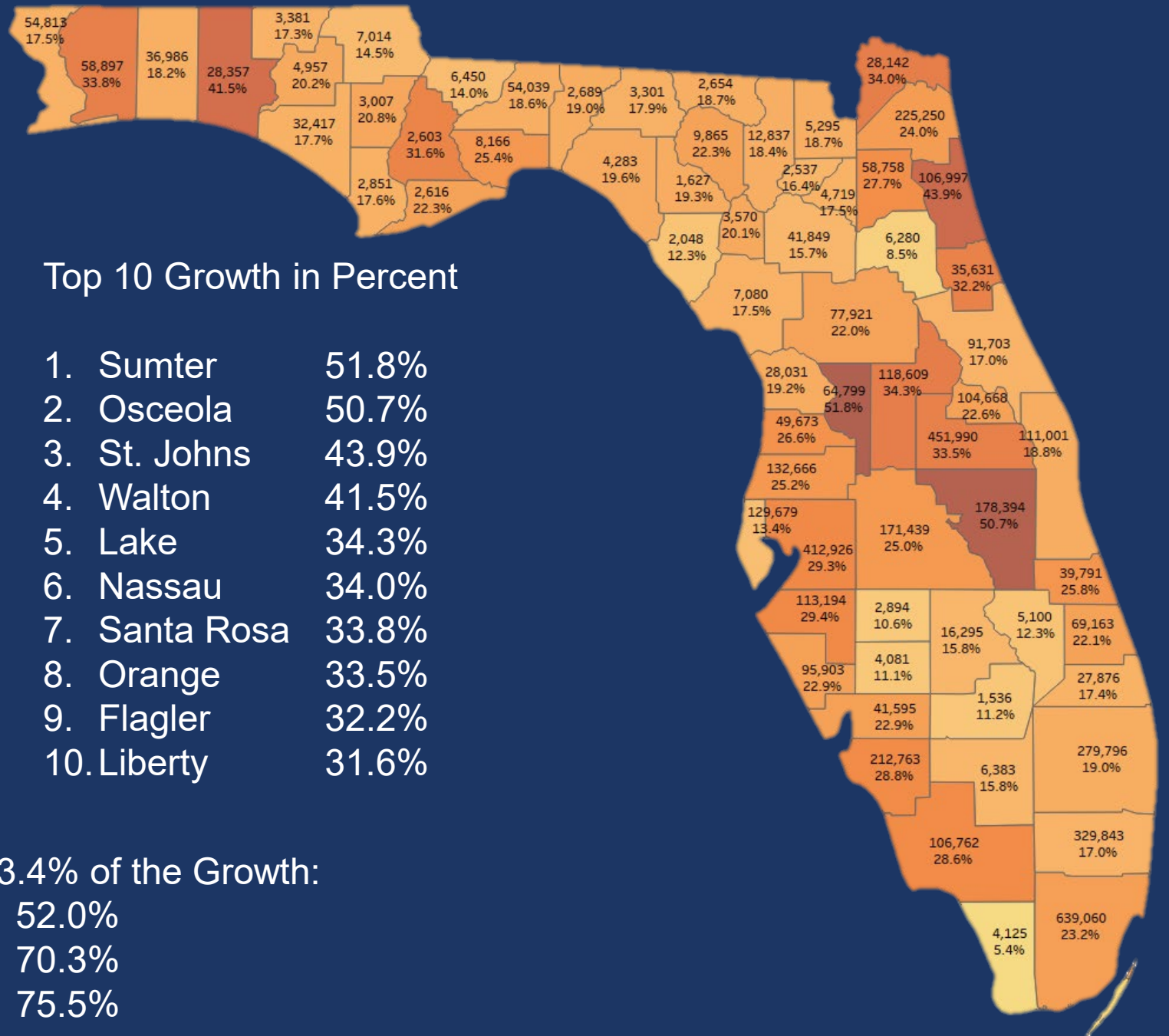
1. Sumter	51.8%
2. Osceola	50.7%
3. St. Johns	43.9%
4. Walton	41.5%
5. Lake	34.3%
6. Nassau	34.0%
7. Santa Rosa	33.8%
8. Orange	33.5%
9. Flagler	32.2%
10. Liberty	31.6%

The top 3 Counties get 33.4% of the Growth:

Top 6: 52.0%

Top 11: 70.3%

Top 13: 75.5%



Growth to 2030 by Age Group

Age Group

85+

80-84

75-79

70-74

65-69

60-64

55-59

50-54

45-49

40-44

35-39

30-34

25-29

20-24

15-19

0-14

0%

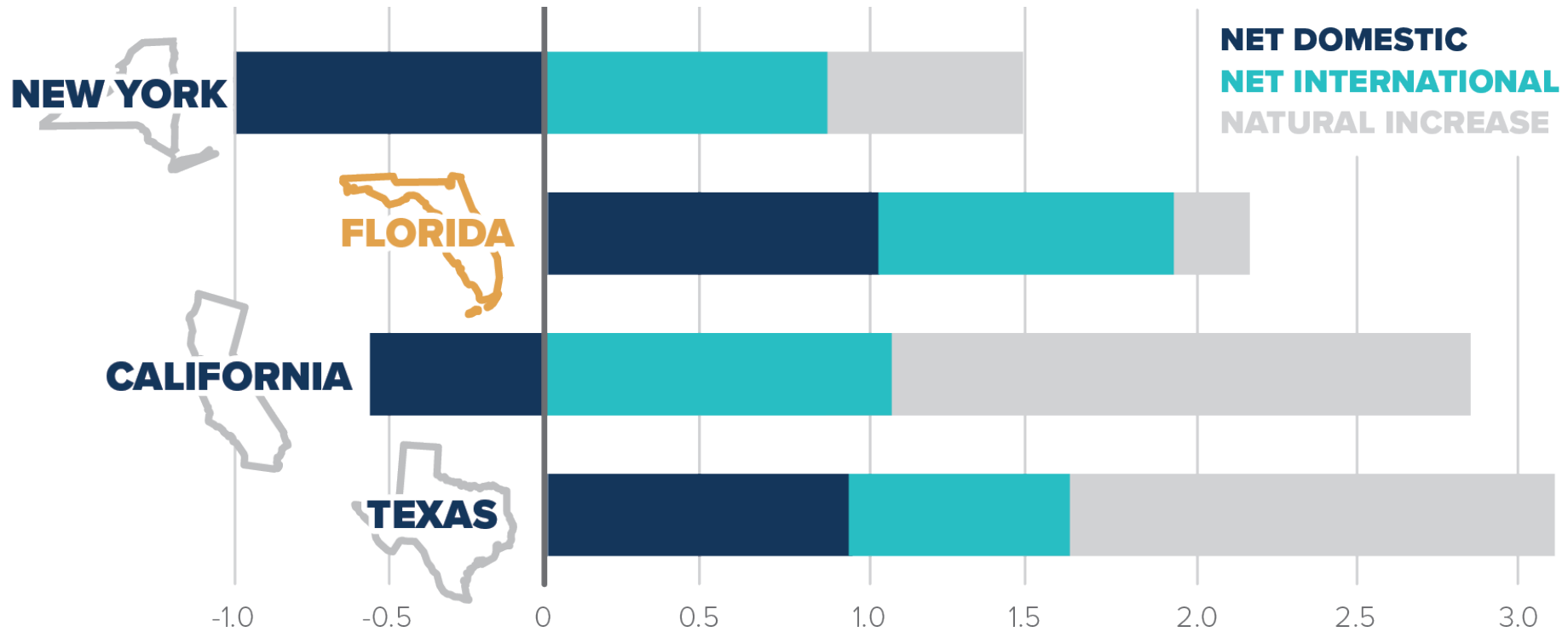
20%

40%

60%

80%

Where Does Florida's Growth Come From?



Can Our 3rd Graders Read?

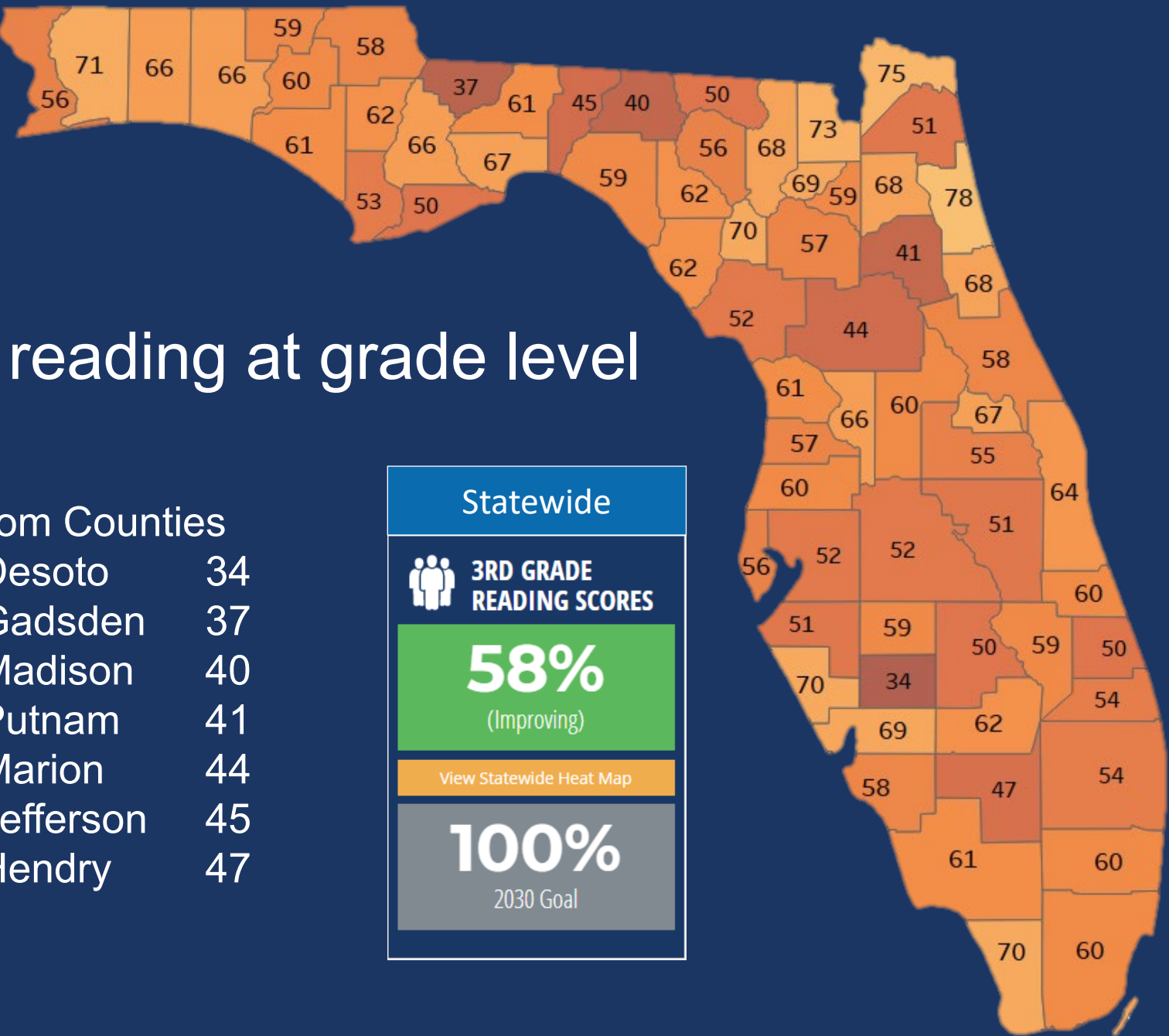
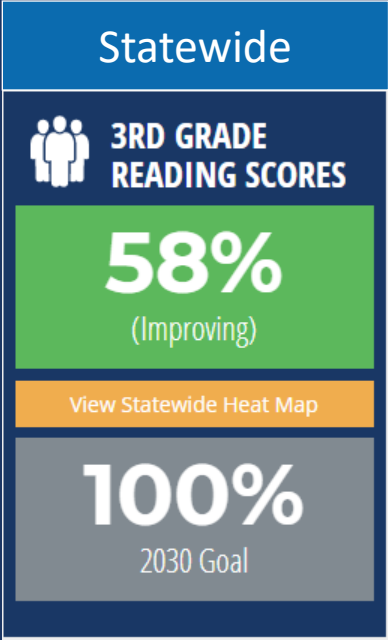
91,066 3rd graders not reading at grade level

Top Counties

- | | |
|---------------|----|
| 1. St. Johns | 78 |
| 2. Nassau | 75 |
| 3. Baker | 73 |
| 4. Santa Rosa | 71 |
| 5. Sarasota | 70 |
| 6. Monroe | 70 |
| 7. Gilchrist | 70 |

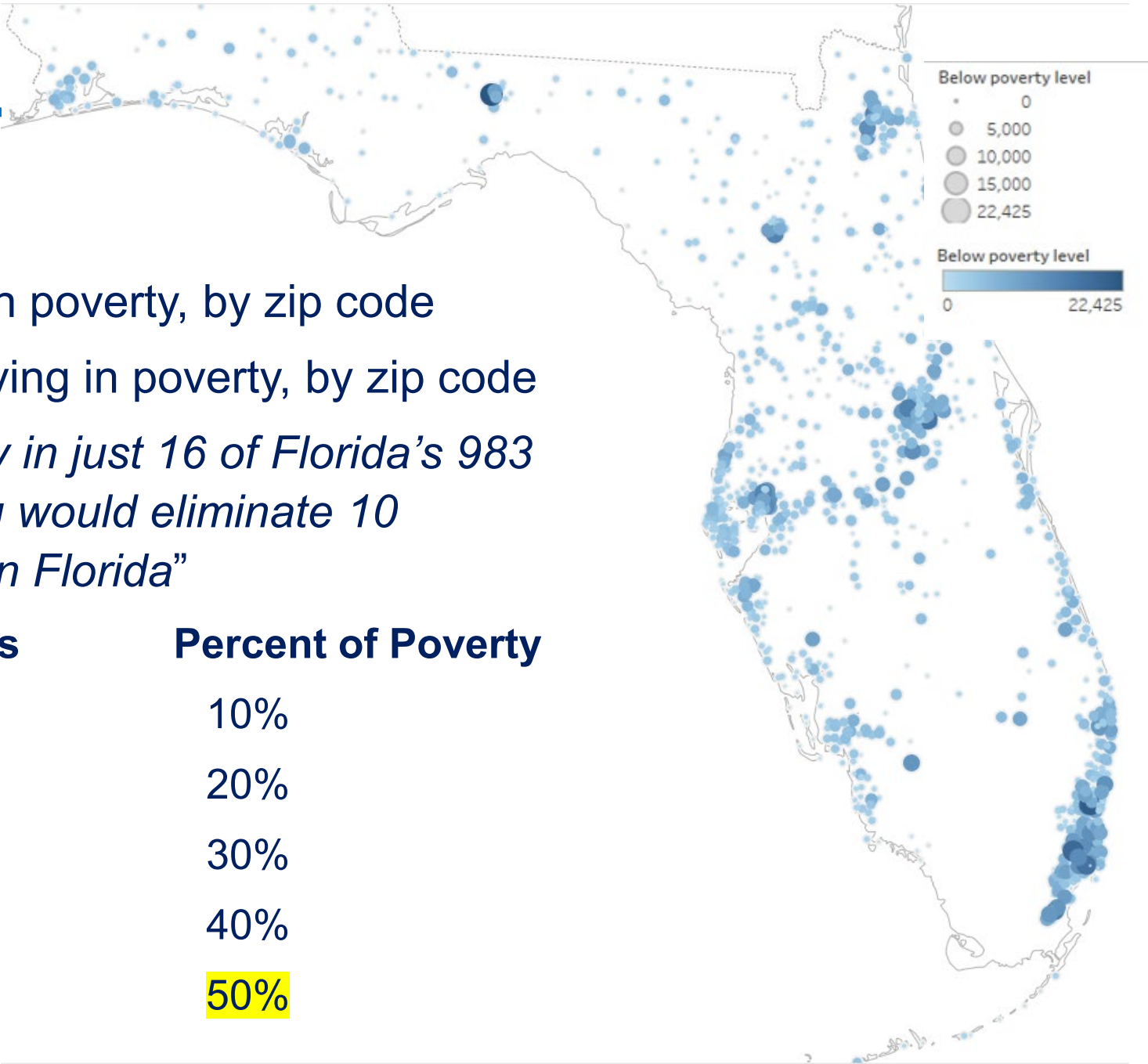
Bottom Counties

- | | |
|--------------|----|
| 1. Desoto | 34 |
| 2. Gadsden | 37 |
| 3. Madison | 40 |
| 4. Putnam | 41 |
| 5. Marion | 44 |
| 6. Jefferson | 45 |
| 7. Hendry | 47 |



3,070,972 people living in poverty, by zip code
901,772 kids under-18 living in poverty, by zip code
“If you eliminated poverty in just 16 of Florida’s 983 populated zip codes, you would eliminate 10 percent of child poverty in Florida”

Top Zip Codes	Percent of Poverty
16	10%
39	20%
69	30%
105	40%
148	50%

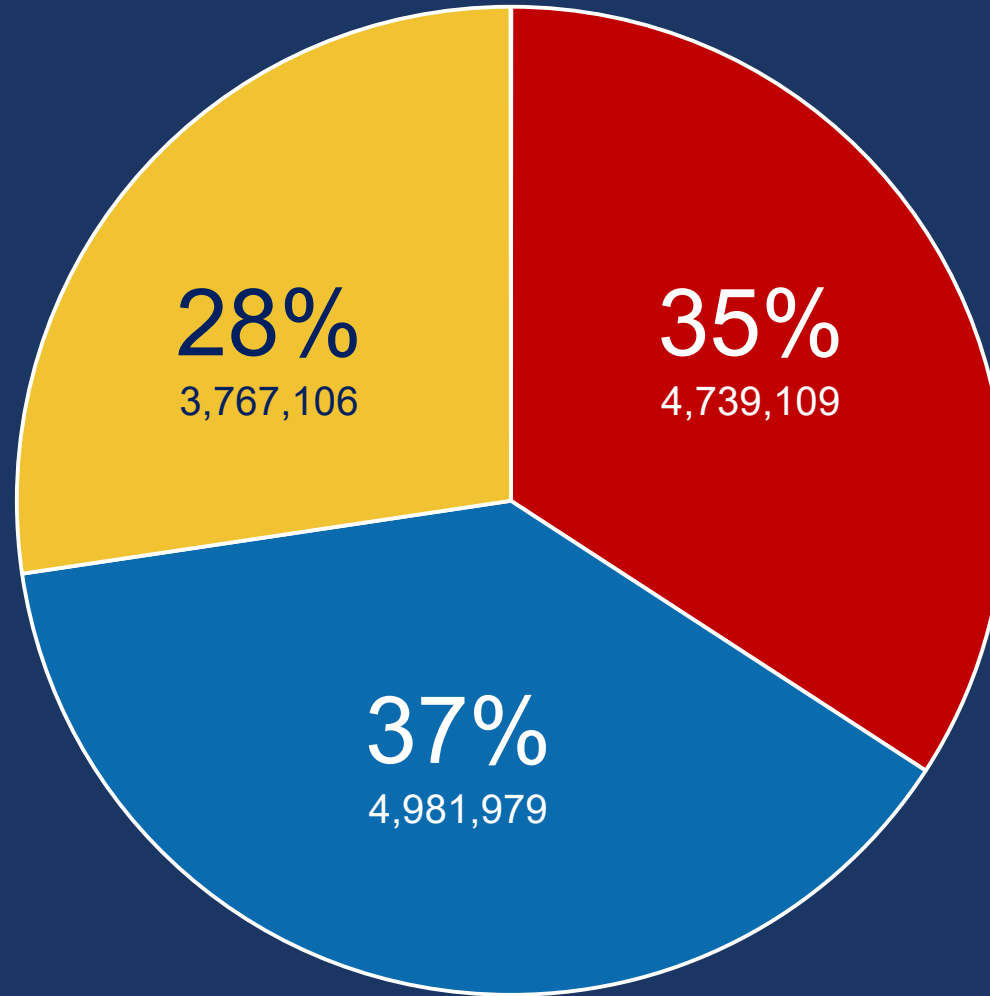


A man in a suit, Mark Wilson, is speaking at a podium. Behind him is a large banner for the "FLORIDA CHAMBER OF COMMERCE" and "STATE OF FLORIDA". The banner displays various economic statistics in a grid format. The text overlay on the image reads: "Florida is changing. Our economics, our demographics and our POLITICS are all changing and these changes are both opportunities and challenges." – Mark Wilson

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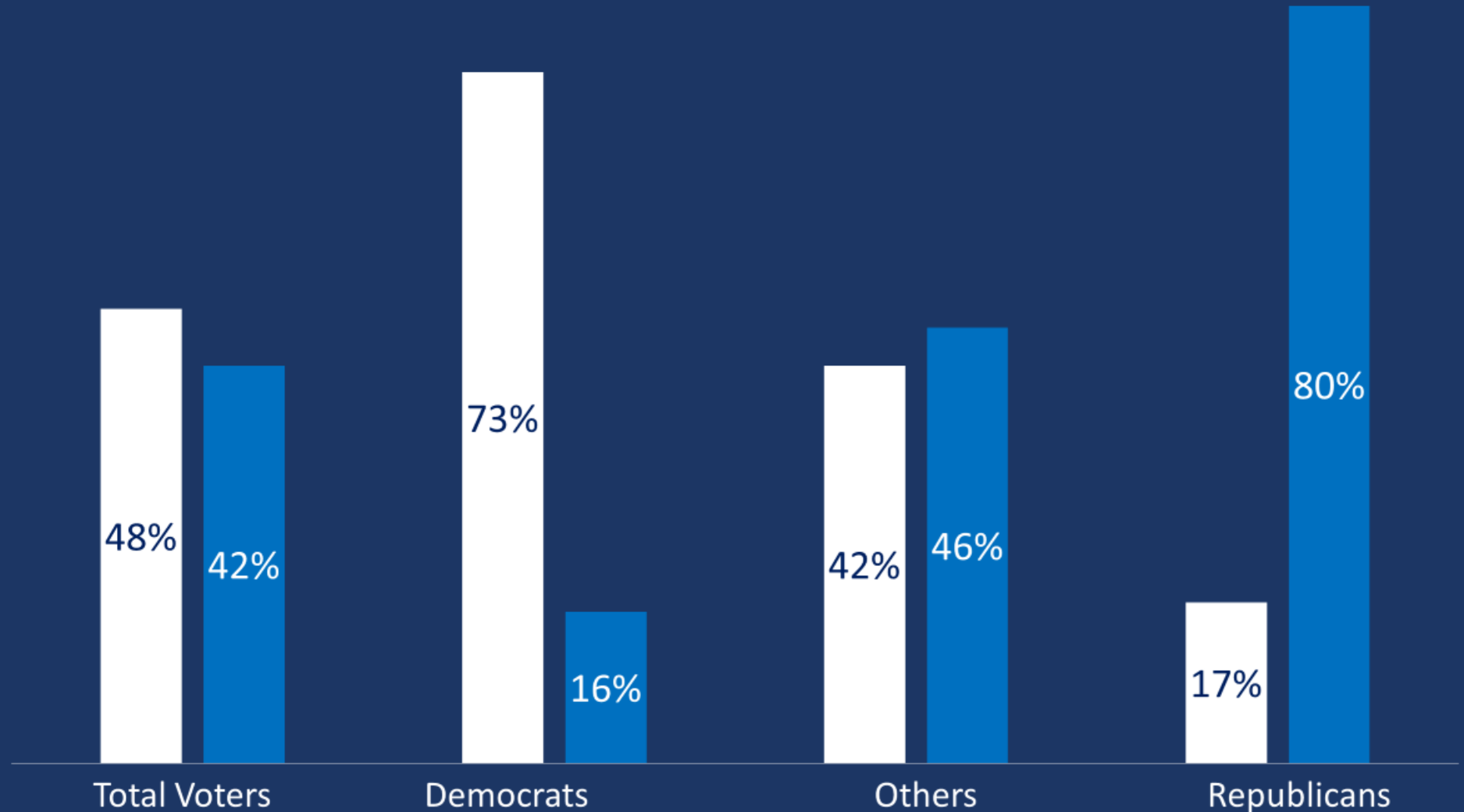
Total Voter Registration in Florida



■ Republican ■ Democrat ■ NPA/Other

What's Better? Socialism or Capitalism?

Voters Under 40



“We won’t get the policies right until we get the politics right.” — Will Weatherford



Constitutional Amendments on the Horizon

Others filed:

- Right of Adults to Cannabis
- Vote by Internet
- All tolls shall be approved by voters
- All traffic citations must be issued without use of red light cameras or speed cameras

Title	Sponsor	Number of Signatures
Citizenship Requirement to Vote	Florida Citizen Voters	927,721
Raising Florida's Minimum Wage	Florida for a Fair Wage	751,676
Allowing Energy Choice	Citizens for Energy Choices	454,563
All Voters Vote in Primary Elections for State Legislature, Governor and Cabinet	All Voters Vote, Inc.	701,024
Ban Assault Weapons	Ban Assault Weapons Now	119,772
Regulate Marijuana Like Alcohol	Sensible Florida, Inc.	91,197
Provide Medicaid Coverage to Low-Income Adults	Florida Decides Healthcare, Inc.	89,000

Florida's Governor & Cabinet



Governor
Ron DeSantis (R)

- ✓ DeSantis won by 32,463 votes
- ✓ DeSantis won 54 Counties
- ✓ Gillum won 13 Counties



Commissioner of Agriculture
Nikki Fried (D)

- ✓ Fried won by 6,753 votes
- ✓ Caldwell won 54 Counties
- ✓ Fried won 13 Counties



Attorney General
Ashley Moody (R)

- ✓ Moody won by 487,620 votes
- ✓ Moody won 59 Counties
- ✓ Shaw won 9 Counties



Chief Financial Officer
Jimmy Patronis (R)

- ✓ Patronis won by 279,681 votes
- ✓ Patronis won 57 Counties
- ✓ Ring won 10 Counties

Job Approval Among Florida's Voters



Republicans

Approve: 88
Disapprove: 5



Democrats

Approve: 44
Disapprove: 35



NPAs/Others

Approve: 62
Disapprove: 20

Florida Legislature



Senate President Bill Galvano

Balance of Power

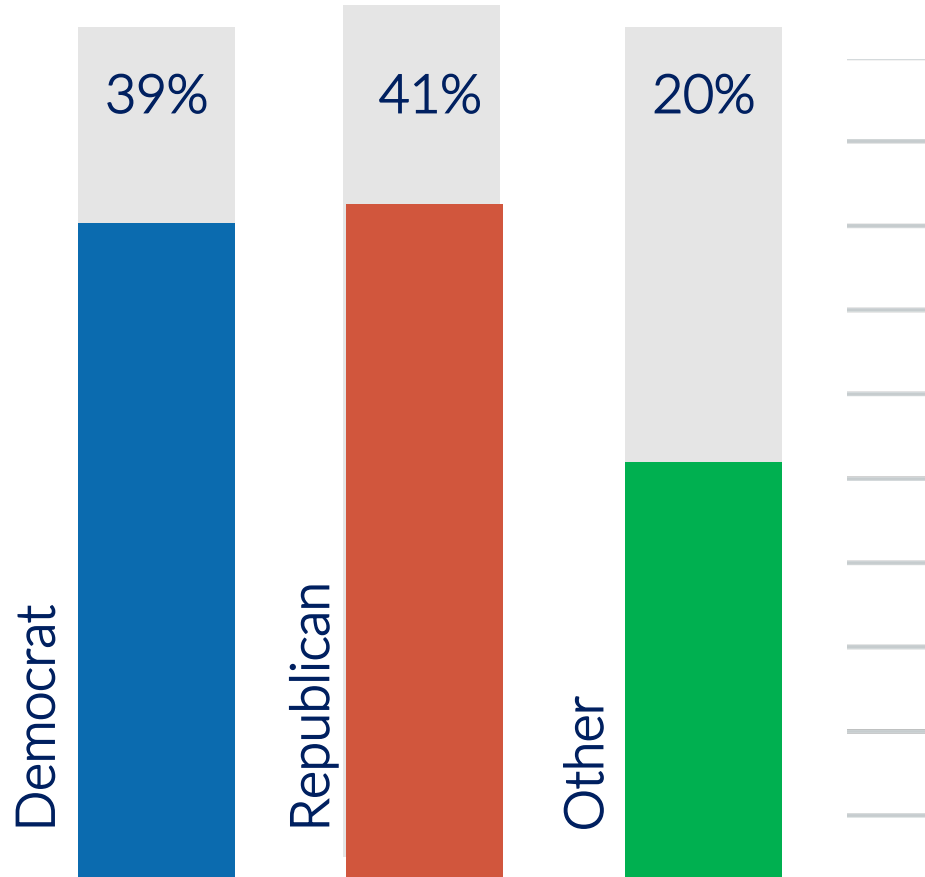
- Senate – 23 R, 17 D
 - 65% new since 2016
- House – 73 R, 47 D
 - 70% new since 2016

110 of 160 of the Legislature
have less than 2 years
experience



House Speaker José Oliva

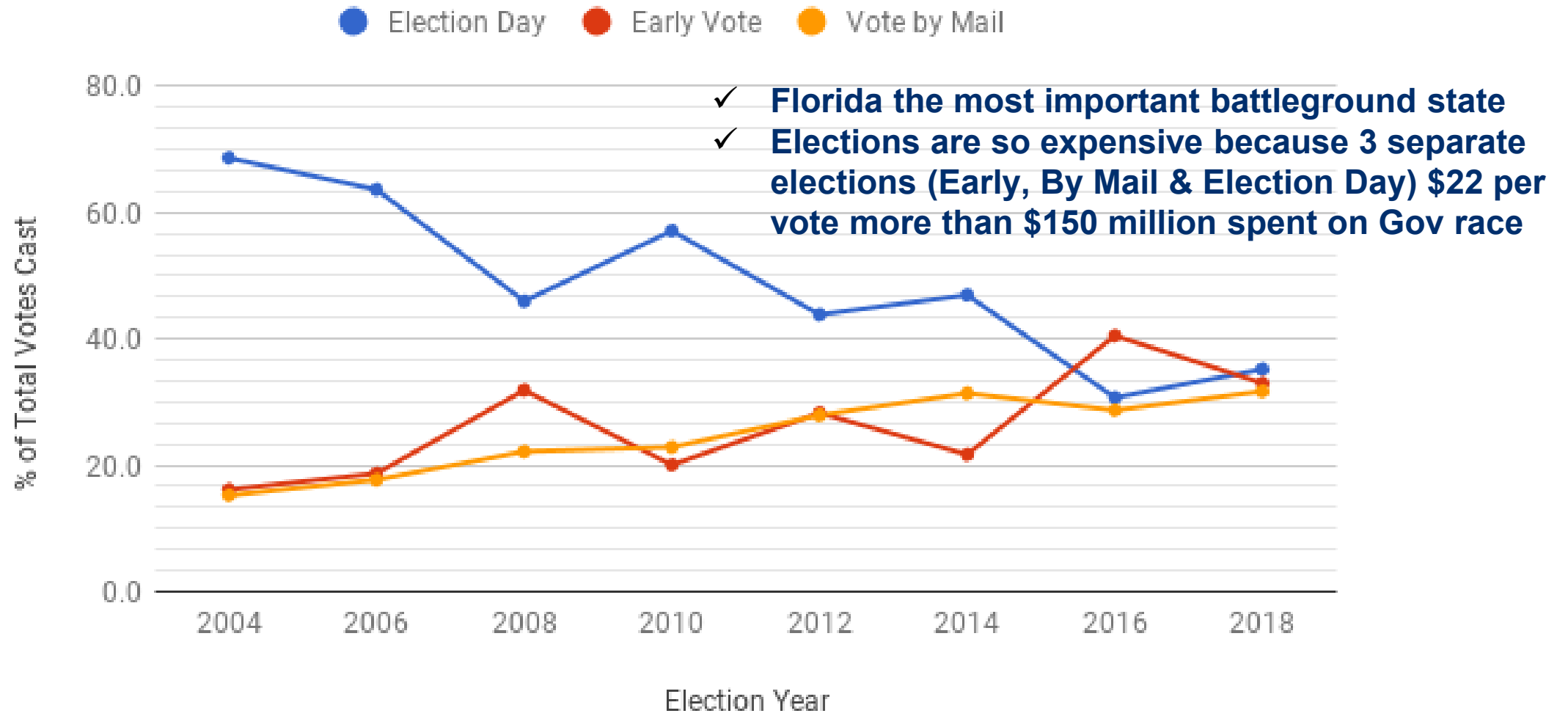
2018 Voter Turnout By Party



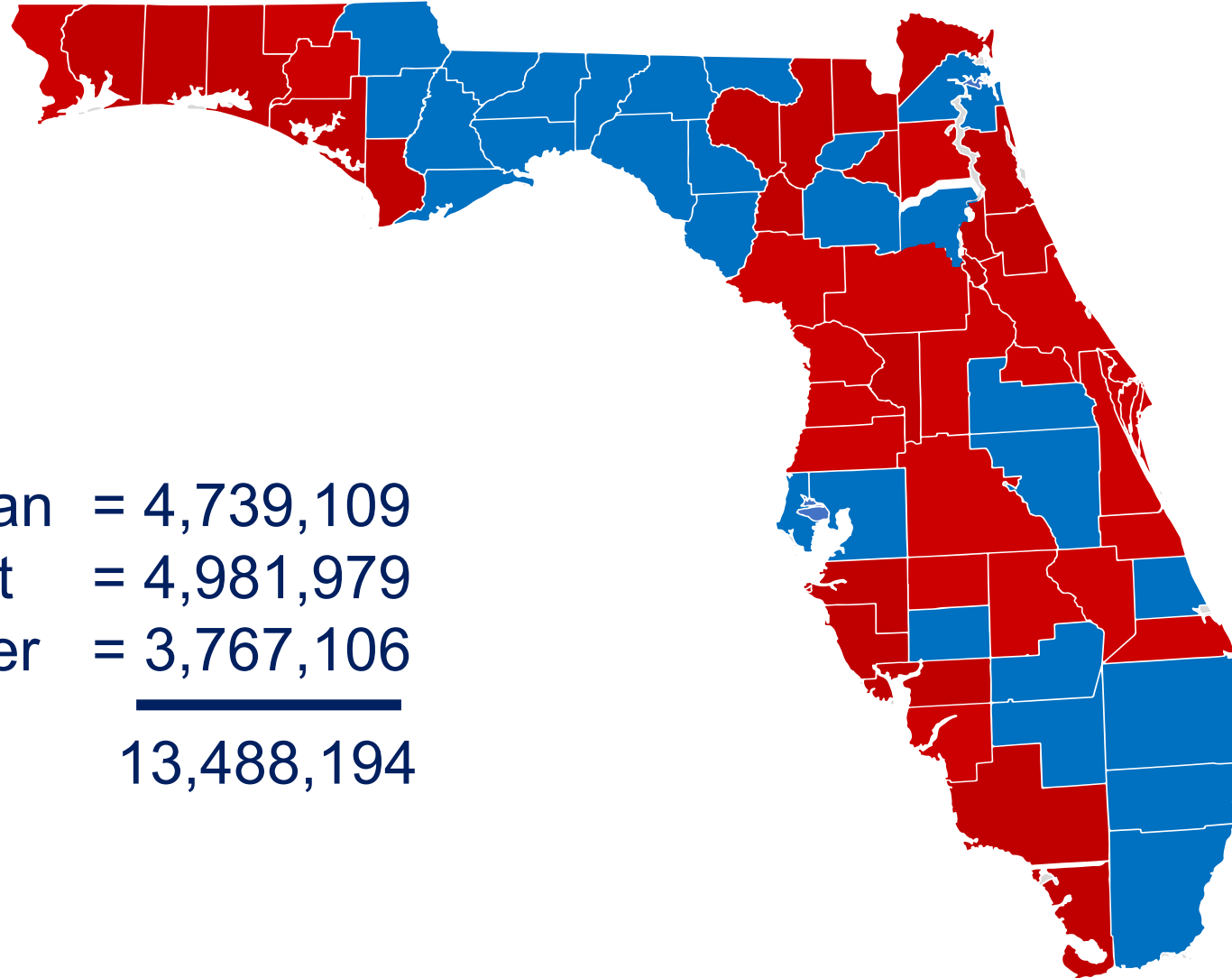
Why was Most Polling wrong in 2018?

- Most polling modeled NPA's higher than they have ever been in an election in Florida. One poll even had NPA above 30%
- Other polls modeled Democratic turnout closer to registration than how they usually perform in midterm elections (R+2 is the norm)

Vote Share by Ballot Method

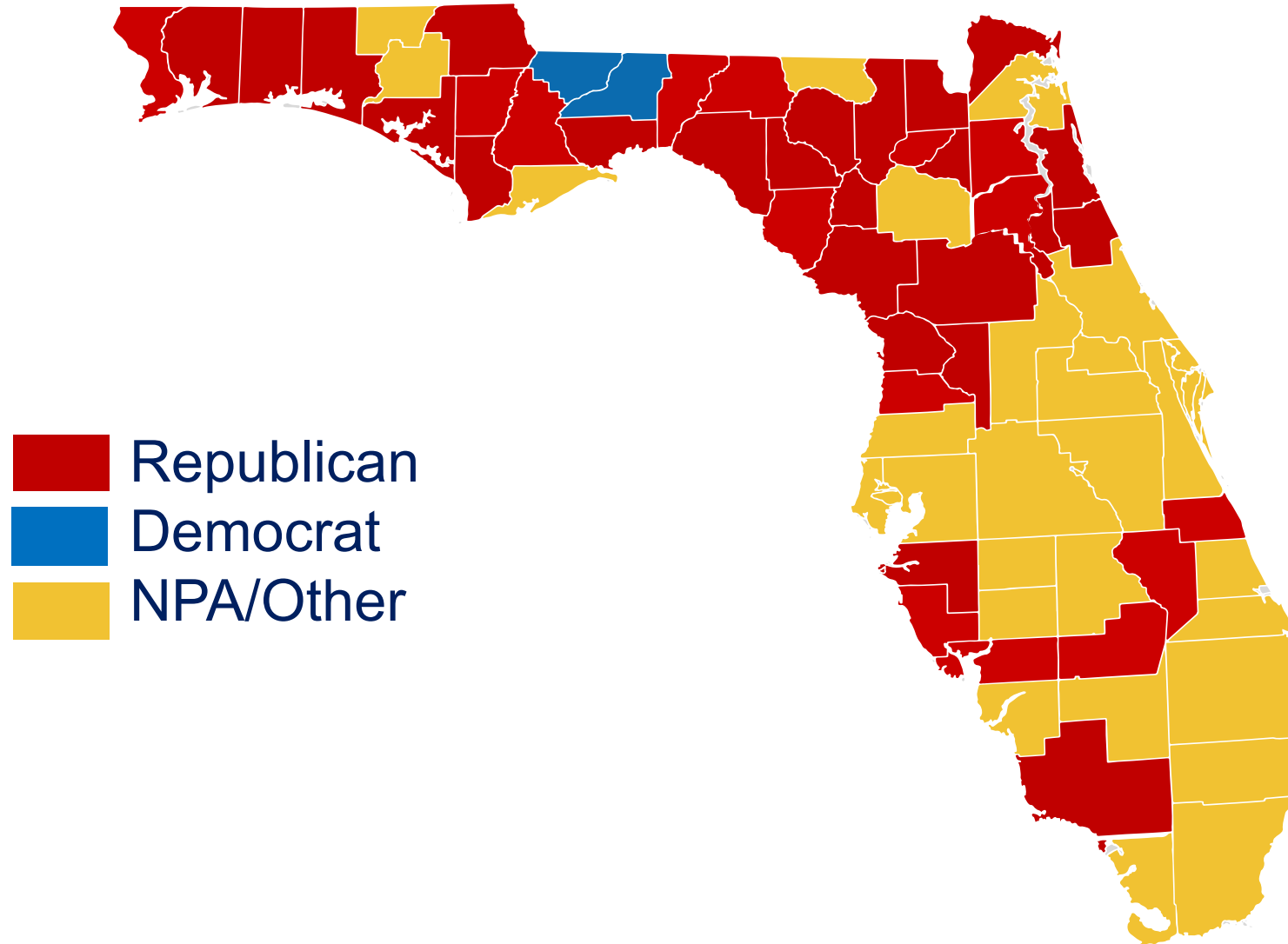


TOTAL VOTER REGISTRATION
By County (39R, 28D)



Republican	= 4,739,109
Democrat	= 4,981,979
NPA/Other	= 3,767,106
	<hr/>
	13,488,194

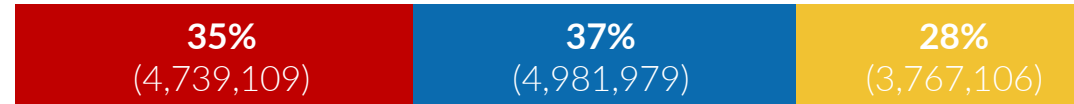
AUGUST NEW VOTERS
By County



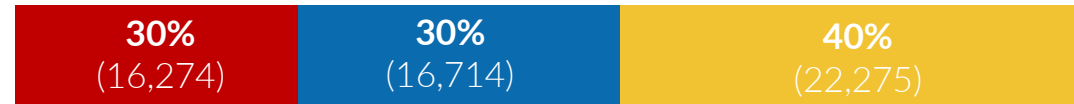
Registration Comparisons Over Time



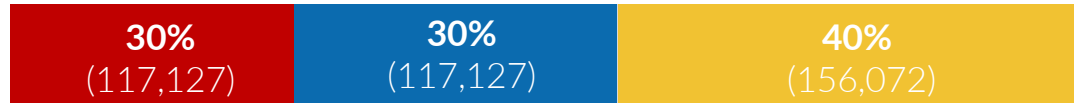
Total State: 13,488,194



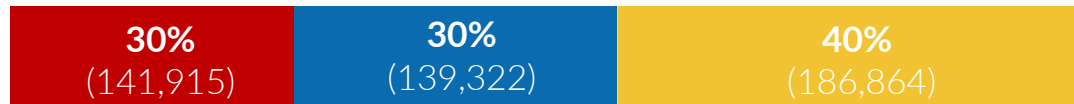
This Month: 55,263



Year to Date: 390,326

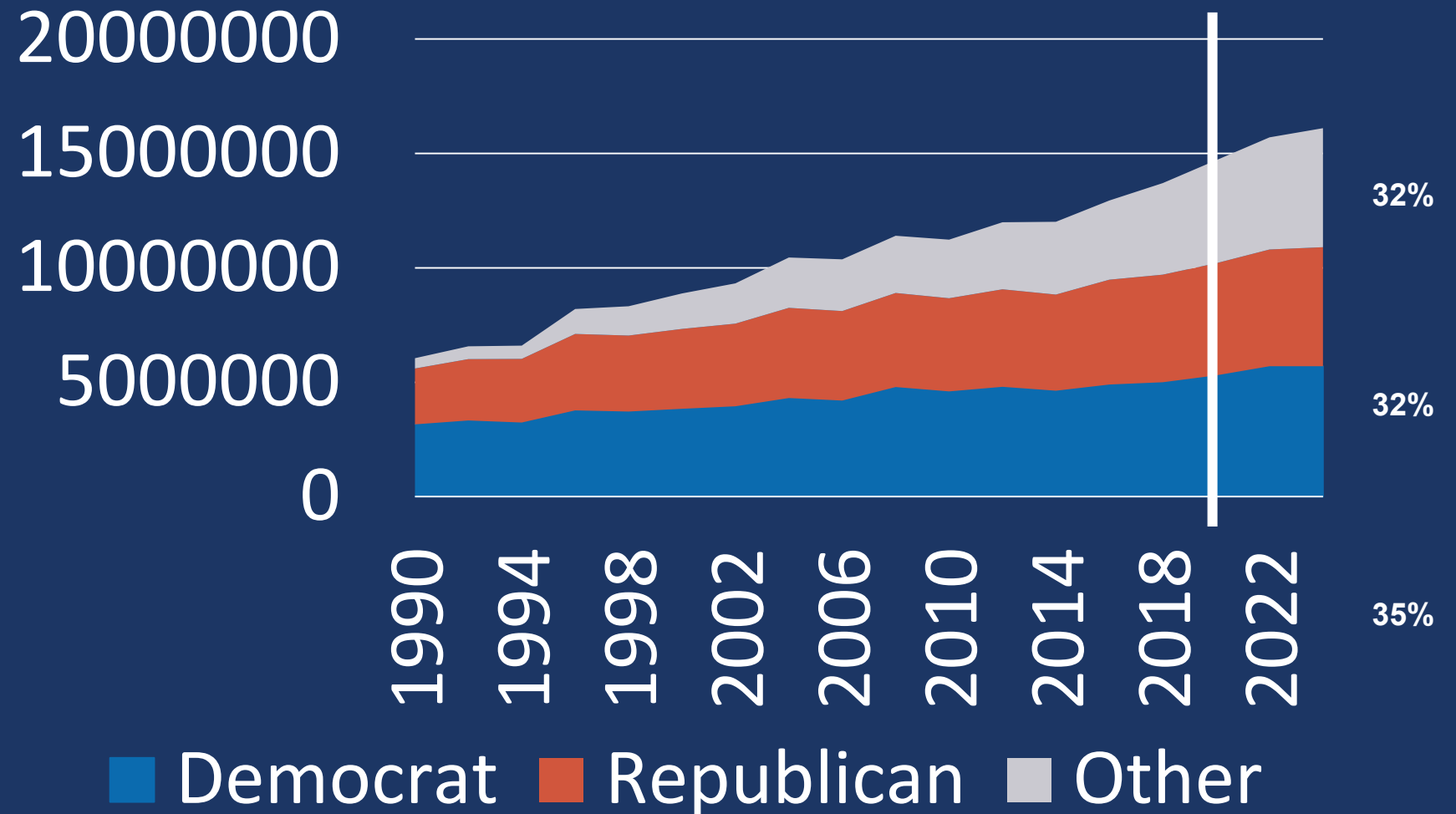


Since Last Election: 468,101



Voters Aren't Choosing Parties

Party
Registration
Projected
1990-2024



Changing Voter Attitudes

Statewide	54:25
Jacksonville	62:22
Gainesville	46:38
Tallahassee	50:31
Panama City/Pensacola	55:25
Orlando/Daytona	53:22
Tampa/St. Pete	56:24
Ft. Myers/Naples	61:25
Broward/Miami	52:27
Palm Beach	48:28

Statewide	54:25
Men	59:24
Women	50:26
Republicans	77:9
Democrats	34:43
Others	48:21
White	59:22
African-American	27:48
Hispanic	61:18

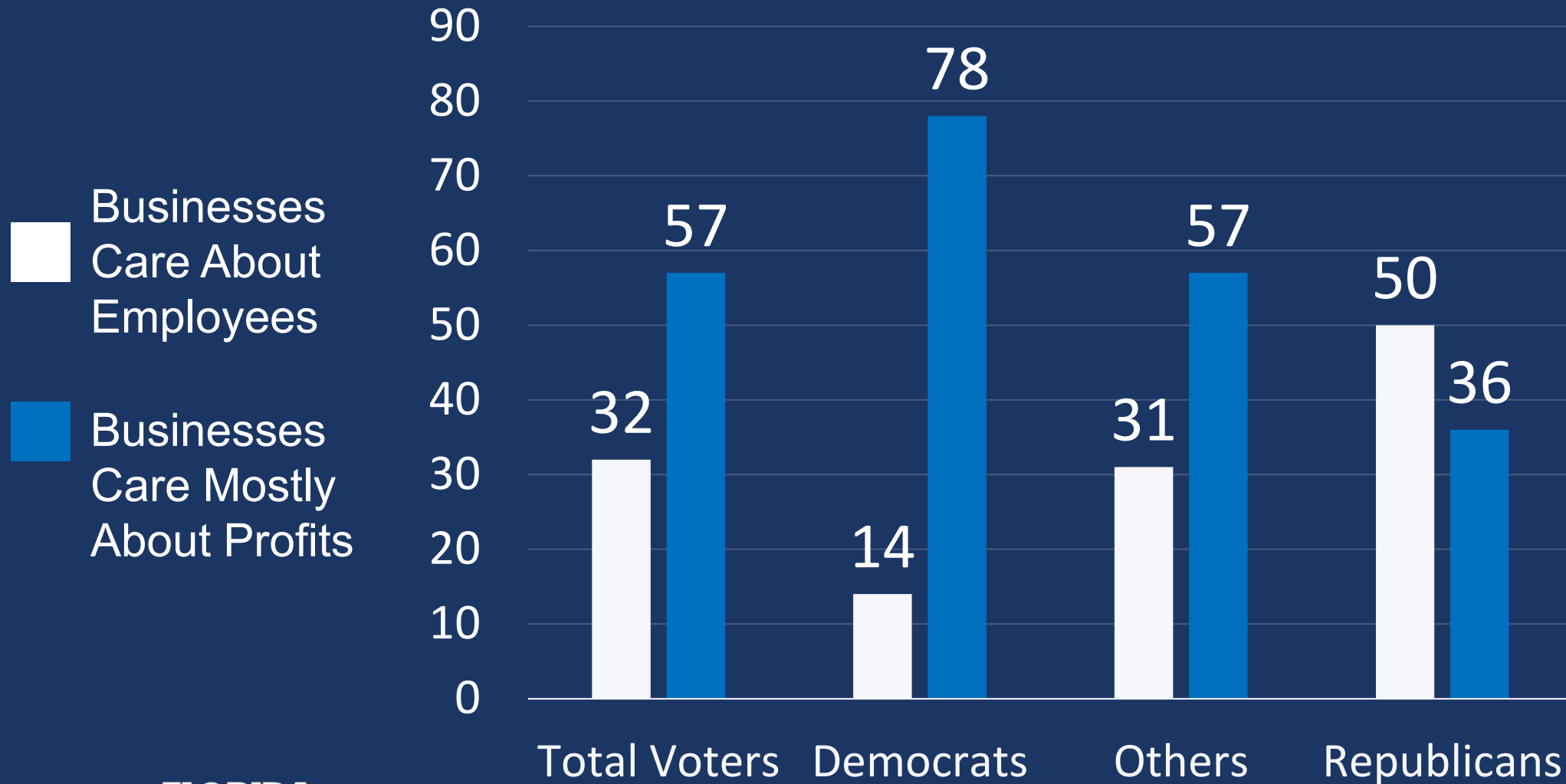
Top Voter Concerns by Media Market

Top Voter Concerns

	EDUCATION	JOBS	ENVIRONMENT	OTHER
Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Jacksonville	22	9	9	Healthcare 11%
Gainesville	15	15	8	Healthcare 15%
Tallahassee	25	6	6	Crime/Drugs 13%
Panama City/Pensacola	16	18	5	Immigration 18%
Orlando/Daytona	15	11	13	Healthcare 11%
Tampa/St. Pete	8	10	12	Healthcare 12%
Ft. Myers/Naples	8	17	11	Immigration 8%
Broward/Miami	13	12	11	Healthcare 9%
Palm Beach	14	10	13	Healthcare 10%

	EDUCATION	JOBS	ENVIRONMENT	OTHER
Statewide	13	11	11	Healthcare 10% Immigration 8% Gun Issues 5%
Men	9	12	13	Healthcare 8%
Women	17	11	9	Healthcare 11%
Rep	11	12	6	Immigration 13%
Dem	16	11	13	Healthcare 13%
Others	13	11	16	Healthcare 8%
White	12	10	15	Immigration 10%
Black	13	14	1	Healthcare 19%
Hispanic	19	17	6	Immigration 9%

What Do You Think Motivates Business In Florida?





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